SOFT DRINKS □ BEER □ BOTTLED WATER □ WINE □ POWDERS □ JUICES □ SPIRITS

JUNE 24, 1983

Beverage Industry

MARKETING □ DISTRIBUTION □ TECHNOLOGY

AN HBJ PUBLICATION

FDA prepares to propose caffeine OK

WASHINGTON, DC—Having missed its own imposed deadline last April to reissue its caffeine proposal, the Food and Drug Administration will decide shortly when and in what form the document surfaces.

In all likelihood, the agency will propose that caffeine receive prior sanction status—a designation used before the 1958 Food Additives Amendment Act where substances were presumed safe until proven otherwise.

This will be a substantial change from FDA's October 1980 proposal that caffeine, a Generally Recognized As Safe (GRAS) substance, be given interim food additive status and be an optional, rather than mandatory ingredient in cola and pepper-type beverages.

FDA has been leaning towards amending the caffeine proposal for some time based on comments it has received from industry and consumers, as well as industry and agency-conducted rat feeding studies assessing the ingredient's safety.

In the agency-sponsored research, forced feeding and water sipping studies in rats found that very high levels of caffeine would have to be ingested to produce birth defects, leading the agency to conclude that the substance is not harmful in humans.

Supermarket shelf space: any left to go around?

By Laura Martinez

SPECIAL REPORT—The recent introduction of many new soft drink flavors, formulations and packages has posed greater marketing opportunities for bottlers while, at the same time, creating many headaches at the retailing level.

Retailers, like bottlers, are motivated by profit and are reluctant to allocate additional shelf space, a fixed resource, to an as yet, unproven product.

New computerized supermarket scanners aid retailers in determining high selling items. It is this definitive information on which shelf space decisions will be made — at the expense of slower moving items.

This leaves bottlers with two routes to go: heavier pro-

(Continued on page 28)

NSDA study: gallonage up 2.7%, dollar value, 5.7%

WASHINGTON, DC—Total soft drink gallonage was up 2.7% in 1982 over '81, according to preliminary figures from the National Soft Drink Association's latest survey.

Based on a poll with 307 plants reporting, the survey offers a detailed look at the industry nationally and regionally.

In 1982, unit sales were up 2.4%, bulk 4.7% and packaged 2.4%. Dollar value increased 5.7% with a wholesale value of $21,156,140,000.

The survey reported total sales of 4,065,815,000 cases.

In bulk, pre-mix was up 2.4% and post-mix 5.2%. In packaged, plastic jumped 9.8%, cans 3.6% and one-way glass 6.5%, but refillable glass was off 6.5%

Glass sales break down by size this way. For one-ways, 6-9 oz. up 11.8%, 24-32 oz. (1-L) down 16.6% and 48-64 oz. (2-L) up 9.5%.

For refillables, 6-9 oz. was off 19.8%, 12 oz. off 16.6%, 16 oz. up 1%, 24-32 oz. off 17.7% and 48-64 oz. off 37%.

By market share, bulk has 22.7% while packaged is at 77.3%. Of the bulk category, 16.6% is pre-mix and 83.4% is post-mix.

In the packaged category, cans lead with 36.5%, glass refillables have 26.4%, plastic 21.4% and glass one-ways 15.7%.

The 2-L size continues to be by far the most popular size in the plastics market with a 93.3% share. 4.4% are 1-L and 2.4% are 1/2-L.

The 16 oz. glass bottle remains the most popular in glass with 55.2% of the one-way market, 64.4% of the refillable market. The 12 oz. size has 29.2% of the one-way share, 13.5% of the refillables. The 48-64 oz. size has 9.5% of the one-ways and .2% of the refillable.

The 24-32 oz. size has 5.3% of the one-way market, 19.7% refillable. The 6-9 oz.

(Continued on page 4)

BI Package of the Week

Mead Packaging's new kraftboard multi-carrier for aseptic packages, left, offers marketing advantages that the traditional film multi-packs, right, don't. See page 18.

Anti-tampering legislation debated in conference

By Patricia Raber

WASHINGTON, DC—A House-Senate conference will soon iron out differences in anti-tampering legislation recently passed by both houses.

The Senate version (S. 216), favored by the soft drink industry, includes language specifically making it a crime to tamper with a product, its label or container with the intent to not only harm individuals but a company's reputation.

The House measure (H.R. 2174) indirectly addresses intent to damage a business through its section dealing with the risk of injury resulting from an actual or attempted tampering.

For example, "if you put a harmless red dye in milk, regardless of the effect on the producer, the tampering would not be covered under the House bill," explained a House Judiciary Committee spokesperson.

However, the bill does pun-

(Continued on page 18)

BI Week

• Jim Beam began testing the first PET liquor bottle in selected test markets in early June. The 1.75-L, uncoated container (in Jim Beam's proprietary square shape) is supplied by Continental's Plastic Bottle Div. Sources indicated that the resin was supplied by

(Continued on page 41)

Contents

New brands threaten beverage shelf space

A special **BI** report poses questions, and some answers, on how bottlers and retailers can get together and plan strategy on how to evenly and fairly allocate enough profitable shelf space to all of the new flavors and formulations.

One solution in dealing with this problem is to make use of all available store space; go outside the beverage aisle, use spot displays, termporary displays. Some may increase promotional spending to increase sales, or, increase the retailer's shelf space. But despite many merchandising opportunities available, whereover there is a winner, there's a loser. See **page 1.**

NSDA's Roberts on regulation in industry

At a recent meeting of the Society of Soft Drink Technologists, Howard Roberts, vice president-science and technology of NSDA, spoke on how new regulatory developments, such as the recycling/mandatory deposit law, is affecting the sott drink industry.

Roberts says forced deposit legislation and recycling questions are among "the most important problems facing our industry today." For more of Roberts' insights and views, see **page 16.**

Mead's aseptic multi-carrier debuts

Mead Packaging, Atlanta, has developed a kraftboard multi-carrier for asepticallyprocessed beverages, a new version of that company's Cluster Pak concept.

It packages container sizes from 250 ml to 1-L.

One major Eastern dairy packer is on the market with a six-unit Cluster-Pak of 250 ml containers. Another is currently being installed in a Western plant, Mead says. See **page 18.**

Coke's Goizueta on segmentation

Roberto C. Goizueta, chairman of the board and chief executive officer of the Coca-Cola Co., spoke recently at the Society of Soft Drink Technologists meeting in Atlanta.

His topic dealt mainly with the diversification and segmentation of the soft drink industry and where it seems

to be heading. He said to achieve greater success in the future, "the technical function must continue to play a major role." See **page 20.**

Powdered beverages up only 1.8% in 1982

In a special **BI** report, yearend results of the powdered beverage market's gains and losses are examined.

The decline in dollar volume was the result in shifts in consumer puchasing patterns away from presweetened and toward unsweetened versions.

In 1982, the two top-selling unsweetened powders, Kool Aid and Hawaiian Punch, sold a combined 561.2 million equivalent gallons of product.

Only General Foods, which manufacturers Kool Aid, and Borden's Wyler brand had gains during the year. See **page 40.**

Departments

Ad Index 56
Beverage Indicators .24
Calendar 42
Classified 52
Editorial 58
New Literature 50
News Makers 43
New Products 48
Reader Service 7
Supply House 47

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BEVERAGE INDUSTRY (ISSN-0148-6187) is published semi-monthly by Magazines For Industry, Inc., a subsidiary of Harcourt Brace Jovanovich Publications. Corporate and Editorial offices: 7500 Old Oak Boulevard, Cleveland, Ohio 44130. Advertising offices: 757 Third Avenue, New York, New York 10017 and 111 East Wacker Drive, Chicago, Illinois 60601. Accounting, Advertising Production and Circulation offices: 1 East First Street, Duluth, Minnesota 55802. Subscription rates: $35 per year in the United States; $45 per year in Canada. All other countries: $70 per year. Single copies (prepaid only): $2 in the U.S.; elsewhere $6.00; add $3.00 for shipping and handling per order. Second class postage paid at Duluth, Minnesota 55806 and additional mailing offices.

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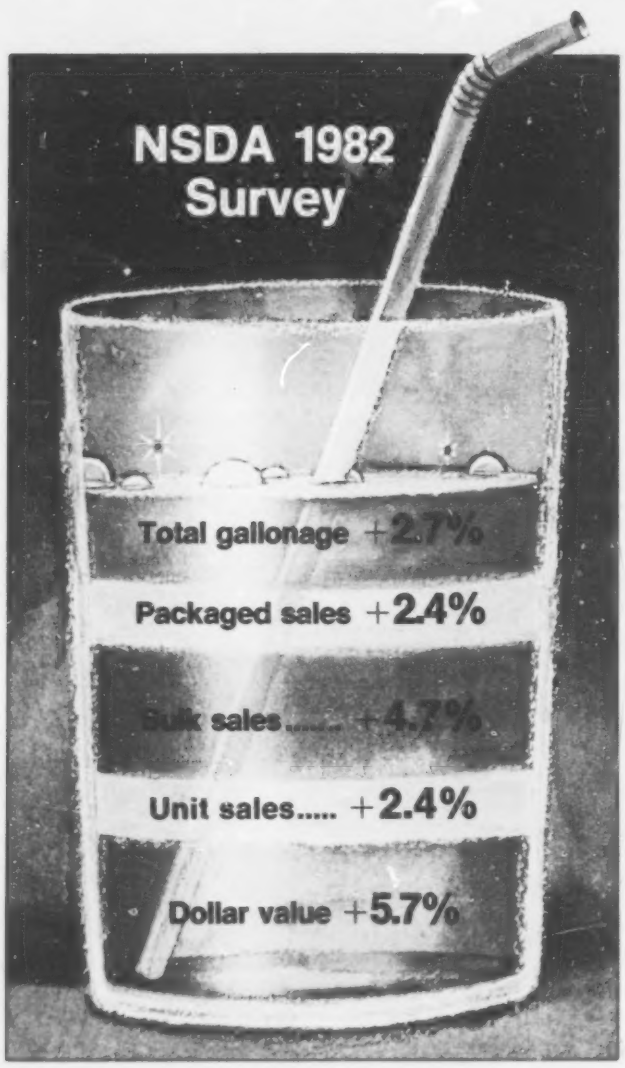

Diets increase to 17.7%; colas to 59.6%

(Continued from page 1)

size, 7% one-way and 2.3% refillable.

The survey reported that diet soft drinks are continuing to grab a larger share of the overall market. While regular soft drinks still hold the lion's share at 82.3%, the diet segment has grown from 15% in 1981 to 17.7% last year.

In the regular category, colas lead the way with 59.6% market share, with lemon-lime next at 11.2%, followed by pepper-type 6%, orange 5.1%, root beer 2.8%, grape 1.7% and ginger ale 1.5%.

In the diet group, colas have 63.3% of the market, lemon-lime 14% and all others 22.7%.

Supermarkets continue to be the most common retail outlet for soft drinks with 46.6% of the soft drinks sold. Convenience stores follow with 19.4%, vending machines 17.3% and other retail outlets with 16.7%.

Regionally, the Northwest had the most successful year with gallonage up 7.7%, units 7.5%, bulk 6.7%, packaged 7.9% and dollar value 16.6%.

The Pacific and the Northeast had off years. The Northeast was down in dollar value .2% while every other region of the country was up.

The Pacific was down .4% in gallonage, .2% in units, 1.5% in packaged sales, but up slightly in dollar and bulk sales.

In the Pacific region, every size glass refillable and one-way was down, except for the 12-oz. one-ways which rose 5.8%

Complete and final figures for the survey will be released by the NSDA in August.

regional

There were a few interesting regional sidelights. In the Southern region, 48-64 oz. glass one-ways increased 37.8%, but refillables were down 69.8%.

Glass one-ways in the 24-32 oz. size were down 38.8% and 48-64 oz. refillables were off 40% in the West Central region.

Glass refillables in the 48-64 oz. size were down 31.3% in the Northeastern region.

Glass one-ways in the 6-9 oz. size were down 39.6% and glass refillables in the 16 oz. size were off 32.8% in the Southwestern region.

One-ways in the 6-9 oz. size in the Western region were also off by 73.9%, but glass one-ways in the 16-oz. size were up 103%.

Regional breakdown

Here's how the National Soft Drink Association breaks down the regions:

Northeastern—Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont.

Southern—Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North and South Carolina, Tennessee, Virginia.

East Central—Illinois, Indiana, Kentucky, Michigan, Ohio, West Virginia, Wisconsin.

Western—Colorado, Idaho, Montana, Nevada, Utah, Wyoming.

Southwestern—Arizona New Mexico, Oklahoma, Texas.

West Central—Iowa, Kansas, Minnesota, Missouri, Nebraska, North and South Dakota.

Pacific—Alaska, California, Hawaii, Oregon and Washington.

Chicago beer distributor debuts bottled water

CHICAGO—Thomas Distributors, Inc., the highest volume Miller Beer distributor in the Midwest, has gone into the seltzer marketing business. In a unique distributing franchise agreement with Syfo Water Co., Inc. of Miami, the Chicago beer distributor has set up two separate companies to distribute the water in Chicago and 15 northern Illinois and Indiana counties.

The water will be available initially through major supermarkets and chain stores in 10 and 28 oz. bottles; additional distribution will include food stores.

Syfo is one of the leading sparkling waters in Florida, Washington D.C., Baltimore, New Orleans and Omaha.

The Chicago introductio. will be supported by television commercials on the morning, evening and late news for all three network affiliate stations, and several spots during prime time on the city's independent stations. Syfo will be priced competitively with other soft drinks but below the imported mineral waters.

Aqua Inc. will handle distribution in the Chicago area and Indiana counties; Syfo of Chicago, Inc. will distribute in Chicago.

Syfo contains no salts, minerals or chemicals and contains less than 10 ppm of total dissolved solids per liter.

● For more information on **Syfo,** circle no. 150 on reader service card.

Syfo Sparkling Water is available in the greater Chicago area in 10 and 28 oz. bottles. A 2-L bottle is being planned for later.

SPI surveys member firms on PVC/food contact uses

WASHINGTON, DC—The Society of the Plastics Industry (SPI) has been receiving survey responses from its members concerning marketing data on current and future food-contact uses of polyvinyl chloride (PVC).

SPI conducted the survey—requested and approved by the Food and Drug Administration—to help the agency estimate dose levels of the polymer in the diet and perform a risk assessment before it issues a proposal shortly on all food-contact uses of PVC, including liquor bottles.

In addition, to enable FDA to assess the environmental impact fom PVC use, the agency asked the plastics industry in late December to respond to seven environmental questions so it can determine the best means of regulating the substance (see **BI,** Feb. 25, 1983).

"The only potential environmental effects that need be dealt with are those associated with the anticipated increased sales of rigid and semi-rigid PVC food-contact materials," Jerome Heckman, SPI counsel, has assured the members.

food contact

As a result, SPI is providing FDA with "figures estimating the total uses of PVC, the food-packaging uses as a fraction of the total, and food-packaging uses of bottles and sheet as a fraction of the food uses."

Some of this data will be available when SPI's marketing survey is completed at the end of the month, Heckman noted.

SPI is confident that the expanded food-packaging uses of PVC would result from FDA approval "will be only a small fraction of the total uses of PVC and, therefore, will give rise to no environmental concerns," Heckman told the members in a recent notice.

←— For more information on Blocpak Canada Inc., circle no. 106 on Reader Service Card

Beverage Business Indicators

Glass container shipments

(thousands of gross)
(not seasonally adjusted)

	Sept. 1982	Oct. 1982	% Change	Oct. 1981	Oct. '81 vs. Oct. '82 % Change
Bottles	26,515	25,956	(2.1)	25,970	(.1)
Beverage: Refillable	207	337	62.8	248	35.9
Nonrefillable	4,986	4,551	(8.7)	4,248	7.1
Under 10 oz.	87	109	25.3	84	29.8
10.0 to 15.9 oz.	1,585	1,445	(8.8)	1,417	2.0
16.0 to 16.9 oz.	2,998	2,696	(10.1)	2,404	12.1
17.0 and over	316	301	(4.7)	343	(12.2)
Beer: Refillable	21	33	57.1	98	(66.3)
Nonrefillable	8,240	8,889	7.9	8,389	6.0
Under 11 oz.	1,793	1,459	(18.6)	1,442	1.2
11.0 to 15.9 oz.	5,875	5,938	1.1	6,485	(8.4)
16.0 and over	572	692	21.0	462	49.8
Liquor:	1,182	1,447	22.4	1,369	5.7
Under 125 ml	62	84	35.5	78	7.7
126 to 275 ml	266	304	14.3	292	4.1
276 to 500 ml	133	203	52.6	207	(1.9)
501 to 800 ml	321	374	16.5	347	7.8
801 to 1000 ml	231	289	25.1	269	7.4
1001 ml and over	169	193	14.2	176	9.7
Wine:	667	718	7.6	755	(4.9)
Under 500 ml	105	126	20.0	120	5.0
501 to 800 ml	339	336	(.9)	338	(.6)
801 to 1000 ml	13	20	53.8	249	(36.1)
1001 to 1600 ml	125	139	11.2		
Over 1600 ml	85	97	14.1	48	102.1

Source: U.S. Dept. of Commerce
Bureau of the Census

Beverage closures

(thousands of gross)

	Sept. 1982	Oct. 1982	% Change	Oct. 1981	Oct. '81 vs. Oct. '82 % Change
Metal (for spirits, wines)*	48,407	57,473	18.7	49,512	16.1
Plastic (for spirits, wines)*	126,012	141,818	12.5	110,971	27.8
Metal crowns (beer & soft drinks)	16,709	16,014	(4.2)	20,832	(23.1)
Soft drink (convenience type)	1,910	314	(83.6)	2,064	(84.8)
Soft drink (conventional types)	5,602	5,329	(4.9)	6,952	(23.3)
Beer (convenience types)	6,584	8,685	31.9	9,343	(7.0)
Beer (conventional types)	2,613	1,686	(35.5)	2,473	(31.8)
All other metal closures than crowns	5,665	6,039	(6.6)	5,870	2.9

*thousands of units
Source: U.S. Dept. of Commerce
Bureau of the Census

Imported beverages

(Proof gals)

	November 1982	December 1982	% Change	December 1981	Dec. '81 vs. Dec. '82 % Change
Beer*	15,391,364	13,012,143	(15.4)	11,727,962	10.9
Whiskey	8,178,758	5,541,583	(32.2)	6,616,860	(16.3)
Brandy	673,330	564,443	(16.2)	519,611	8.6
Gin	655,186	482,505	(26.4)	385,131	25.3
Rum	126,409	71,254	(43.6)	43,779	62.8
Cordials & liqueurs	1,103,575	957,715	(13.2)	910,846	5.1
Others	1,007,303	655,164	(35.0)	640,331	2.3
TOTAL	27,135,925	21,284,807	(21.6)	20,844,520	2.1
Sparkling wines	1,133,457	1,287,984	13.6	439,973	192.7
Still wines, table	10,754,060	10,559,344	(1.8)	10,002,875	5.6
Still wines, fortified	449,994	323,755	(28.1)	296,867	9.1
Vermouth	326,826	255,132	(21.9)	282,162	(9.6)

*Includes ale, stout, porter
Source: National Association of Beverage Importers, Inc.

Selected consumer price index

(Base: 1967 = 100)

	December 1982	January 1983	% Change	January 1982	Jan. '82 vs. Jan. '83 % Change
Cola	307.2	312.9	1.9	302.4	3.5
Other carbonated soft drinks	142.2	145.2	2.1	141.9	2.3
Noncarbonated drinks	139.0	141.0	1.4	138.0	2.2
Wine	235.6	235.6	0	232.2	1.5
Beer and Ale	212.6	213.3	.3	205.0	4.0

Source: U.S. Dept. of Labor
Bureau of Labor Statistics

The Consumer Price Index (CPI) is a measure of the average changes in prices over ti... fixed "market basket" of goods and services. The index measures price changes from a de...ated reference date which equals 100 (usually 1967). An increase of 22 percent, for example ...own as 122. This change can also be expressed in dollars as follows: The price of a base perio... market basket" of goods and services in the CPI has risen from $10 in 1967 to $12.20.

Domestic Beer Removals

(Barrels of 31 gals)

	October 1982	November 1982	% Change	November 1981	Nov. '81 vs. Nov. '82 % Change
Bottles and cans	12,008,499	11,397,298	(5.1)	10,763,745	5.9
Barrels and kegs	1,820,512	1,740,168	(4.4)	1,623,312	7.2
For export	235,637	181,843	(22.8)	198,420	(8.4)
Other	13,993	20,517	46.6	11,833	73.4
TOTAL	14,078,641	13,339,826	(5.2)	12,597,310	5.9

Source: U.S. Dept. of the Treasury
Bureau of Alcohol, Tobacco and Firearms

Domestic Wine Removals

(Wine gals)

	October 1982	November 1982	% Change	November 1981	Nov. '81 vs. Nov. '82 % Change
Still wines (bulk)	202,039	171,048	(15.3)	111,706	53.1
Still wines (bottled)	33,941,385	70,886,049	108.8	31,434,519	125.5
Effervescent wines (bulk and bottled)	6,547,842	2,852,600	(56.4)	3,906,441	(27)
TOTAL	40,691,266	73,909,697	81.6	35,352,666	109.1

Source: U.S. Dept. of the Treasury
Bureau of Alcohol, Tobacco and Firearms

Domestic Spirits Removals

(Wine gals)

	September 1982	October 1982	% Change	October 1981	Oct. '81 vs. Oct. '82 % Change
Whiskey	14,300,076	17,338,255	21.2	17,910,638	(3.2)
Brandy	1,210,106	1,205,772	(.4	1,575,603	(23.5)
Rum	2,371,817	2,898,539	22.2	2,347,808	23.5
Gin	2,978,289	3,107,189	4.3	2,970,727	4.6
Vodka	8,117,053	8,859,929	9.2	8,735,824	1.4
Cordials & Liqueurs	3,087,686	3,539,497	14.6	3,548,523	(.3)
Cocktails & mixed drinks	637,653	482,221	(24.4)	652,521	(26.1)
TOTAL	32,702,680	37,431,402	14.5	37,741,644	(.8)

Source: U.S. Dept. of the Treasury
Bureau of Alcohol, Tobacco and Firearms

Blow-molded Plastic Bottle Production

(thousands of units)

	September 1982	October 1982	% Change	October 1981	Oct. '81 vs. Oct. '82 % Change
Plastic bottles (blow-molded)	1,315,007	1,292,920	(1.7)	1,275,276	1.4
Carbonated beverages	225,052	206,339	(8.3)	174,949	17.9

Source: U.S. Dept. of Commerce
Bureau of the Census

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Retail volume of powdered drink mixes

	1974		1975		1976		1977		1978		1979		1980		1981		1982		Change
	Vol.	Pct.	Vol.	Pct.	Vol.	Pct.	Vol.	Pct.	Vol.	Pct.	Vol.	Pct.	Vol.	Pct.	Vol.	Pct.	Vol.	Pct.	1981/82
General Foods																			
Kool-Aid*	406.5	54.9	448.9	54.3	473.3	52.0	508.0	48.3	506.0	45.5	491.4	44.7	486.5	43.7	520.0	46.4	546.0	47.9	5.0
Kool-Aid +	102.7	13.9	140.9	17.0	141.0	15.1	151.0	14.4	149.6	13.5	153.4	13.9	165.9	14.9	142.7	12.7	143.0	12.5	0.2
Country Time	—	—	—	—	39.0	2.0	50.0	4.8	61.7	5.5	72.8	6.6	72.4	6.5	64.4	5.8	62.2	5.5	(3.4)
Total	509.2	68.8	589.8	71.3	653.3	69.1	709.0	67.5	717.3	64.5	717.6	65.2	724.8	65.1	727.1	64.9	751.2	65.9	3.3
Borden																			
Wyler	135.4	18.3	130.9	15.8	114.5	12.2	105.0	10.0	62.4	5.6	62.4	5.7	67.2	6.0	98.4	8.8	153.6	13.5	56.1
Borden Prize	—	—	—	—	17.5	1.8	13.0	1.2	4.8	0.4	4.8	0.4	—	—	—	—	—	—	—
RealLemon Crystals	—	—	—	—	—	—	—	—	—	—	—	—	9.6	0.9	12.0	1.1	7.2	0.6	(40.0)
Total	135.4	18.3	130.9	15.8	132.0	14.0	118.0	11.2	67.2	6.0	67.2	6.1	76.8	6.9	110.4	9.9	160.8	14.1	45.7
R.J. Reynolds																			
Hawaiian Punch*	—	—	—	—	—	—	—	—	52.3	4.7	37.0	3.4	29.1	2.6	22.3	2.0	15.2	1.3	(31.8)
Hawaiian Punch +	—	—	—	—	65.6	6.0	75.0	7.1	53.9	4.9	51.8	4.7	44.4	4.0	38.9	3.5	24.8	2.2	(36.2)
	—	—	—	—	65.6	6.0	75.0	7.1	106.2	9.6	88.8	8.1	73.5	6.6	61.2	5.5	40.0	3.5	(34.6)
Coca-Cola																			
Hi-C	—	—	—	—	—	—	—	—	46.7	4.2	44.4	4.0	37.5	3.4	32.2	2.9	—	—	—
Minute Maid	—	—	—	—	—	—	—	—	34.3	3.1	36.6	3.3	40.3	3.6	36.3	3.2	35.4	3.1	(2.5)
	—	—	—	—	—	—	—	—	81.0	7.3	81.0	7.3	77.8	7.0	68.5	6.1	35.4	3.1	(48.3)
Pillsbury																			
Funny Face	51.4	6.9	47.2	5.7	39.0	4.5	24.0	2.3	16.9	1.5	—	—	—	—	—	—	—	—	—
Squeze	—	—	—	—	18.5	1.9	14.0	1.3	2.5	0.2	—	—	—	—	—	—	—	—	—
Total	51.4	6.9	47.2	5.7	57.5	6.4	38.0	3.6	19.4	1.7	—	—	—	—	—	—	—	—	—
Lipton																			
Lemon Tree	—	—	—	—	—	—	—	—	—	—	21.0	1.9	23.0	2.1	11.5	1.0	4.0	0.4	(65.2)
Private labels & others	44.0	6.0	59.1	7.2	73.7	4.5	110.7	10.6	120.9	10.9	125.4	11.4	137.4	12.3	141.3	12.6	148.6	13.0	5.2
Total market volume	740.0	100.0%	827.0	100.0%	982.0	100.0%	1,050.7	100.0%	1,112.0	100.0%	1,101.0	100.0%	1,113.3	100.0%	1,120.0	100.0%	1,140.0	100.0%	1.8
Total Sales ($ mil.)	$235		$420		$480		$500		$530		$662		$625		$770		$735		

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Institutional food service sales of concentrated drink mixes

Powders	1976	1977	1978	1979	1980	1981	1982	Change 1981/82	1982 Market Shares Powders	Total
General Foods										
Twist	5.2	5.4	5.7	6.3	8.8	8.9	8.9	—	17.5%	5.3%
Nestle										
Keen	2.6	2.8	—	3.4	4.1	4.3	4.8	11.6	9.4	2.8
Amstar										
Dominade	3.6	4.1	4.6	3.2	3.5	3.6	4.1	13.9	8.1	2.4
Iroquois Grocery Products (Cramore)										
Dri-Syrups	0.8	0.8	0.8	0.9	1.0	1.5	1.8	20.0	3.5	1.1
Crystals	0.3	0.3	0.3	0.4	0.5	0.5	0.5	—	1.0	0.3
Total	—	1.1	1.1	1.1	1.3	1.5	2.0	15.0	4.5	1.4
Borden										
Wyler's	2.0	2.2	2.3	2.3	2.3	2.0	1.8	(10.0)	3.5	1.1
Nabisco Brands										
Royal	3.1	3.1	3.2	3.5	—	—	—	—	—	—
Private labels & others	22.4	26.1	28.5	28.0	32.1	29.2	28.9	(1.0)	57.0	17.1
Total powdered volume	40.0	44.8	48.4	48.0	52.3	50.0	50.8	1.6	100.0%	30.1
Syrups	100.0	110.0	115.5	114.3	116.0	118.0	118.0	—		69.9
Total drink mix volume	140.0	154.8	163.9	162.3	168.3	168.0	168.8	0.5		100.0%
Total sales ($ mil.)	$105	$111	$116	$119	$135	$165	$170	3.0%		

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$735 million powder market grows slowly, up only 1.8% in '82

SPECIAL REPORT—Powdered beverage marketers are hoping that their new aspartame-sweetened low calorie products can put some growth back into the marketplace. Total gallonage was up only 1.8% in 1982, dollar volume was down 4.5% to $735 million.

The decline in dollar volume was the result of shifts in consumer purchasing patterns away from presweetened and towards unsweetened versions which have a lower retail pricetag.

In 1982, the two top selling unsweetened powders—Kool Aid and Hawaiian Punch—sold a combined 561.2 million equivalent gallons of product. In 1981, the gallonage was 542.3. Presweetened versions of the same brands went from 181.6 million gallons to 167.8 million.

gains

Only General Foods Kool Aid and Borden's Wyler brand, up 56.1% to 153.6 million gallons, had gains during the year. Kool-Aid unsweetened was up 5% to 546 million gallons. The presweetened version was up .2% to 143 million gallons.

Private label brands and "others" did show some gains, up 5.2% to 148.6 million gallons.

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Retail volume of instant breakfast drinks

(Mil. gal. equivalent, water-base beverages only)

	1974	1975	1976	1977	1978	1979	1980	1981	1982	Change 1981/82
General Foods										
Tang	62.0	56.6	54.9	65.0	68.3	68.3	61.5	63.5	61.0	(3.9)%
Start	1.9	1.2	0.7	0.3	0.1	0.1	0.1	—	—	
Borden										
Instant Breakfast	13.0	13.1	11.1	10.0	7.5	6.0	5.2	4.0	3.0	(25.0)
Private labels & others	16.1	11.1	11.7	9.7	12.5	14.2	12.9	8.2	8.7	6.1
Total volume	93.0	82.0	78.4	85.0	88.4	88.6	79.7	75.7	72.7	(4.0)
Total sales ($ millions)	$92.6	$106.2	$98.0	$106.8	$111.7	$119.0	$129.7	$145.0	$120.0	(17.2)%

Source: Lehman Brothers Kuhn Loeb Research

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Hoping that utilization of aspartame will help open a new segment, three major marketers of powdered beverages have introduced new versions:

- General Foods has debuted sugar-free Kool-Aid and Crystal Light.
- Thomas J. Lipton Inc., has a new version of its Lipton Iced Tea mix.
- Borden is set to roll out it's aspartame-sweetened version of Wyler's.

ad budgets

Borden reportedly has plans to back it's new product with a $20 million ad budget.

General Foods has also budgeted $20 million to back it's total Kool-Aid effort (includes unsweetened and both sugar- and aspartame-sweetened versions.) At presstime, no numbers were available on Crystal Light, being rolled out initially in 23 markets.

Positioned as an adult "soft drink", introductory commercials focus on fitness and tie-ins with local fitness centers are touted.

Retail volume of instant breakfast drinks was down in 1982, 17.2% to 72.7 million gallons with an estimated dollar volume of $120 million. Total powder sales to institutes was up slightly 1.6% to 50.8 million gallons. Sales of drink syrups to these outlets was up 0.5% in gallons, 3% in dollar volume.

New Crystal Light brand and Sugar Free Kool-Aid brand drink mixes are sweetened with aspartame and have four calories per 8-oz. serving.

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